MEETING PLANNING ASSISTANCE CHECKLIST

PRE-MEETING PREPARATION
- Create timeline and checklist
- Develop, design and distribute meeting promotion and marketing materials
- Negotiate with hotel for:
  - meeting rooms
  - sleeping rooms
  - audio/visual equipment
  - food/beverages
- Find speakers/facilitators
- Create meeting invitation list
- E-mail meeting announcement to invitation list
- Receive and process registration forms
- Create participant confirmation letter
- Collect information on speakers/facilitators
- E-mail or fax participant confirmation letter and travel information sheet
- Arrange and finalize all catering

FACILITATE RESERVATIONS
- Send guest rooming list to the hotel
  OR
- Monitor individual reservation call-in (observing hotel cut-off date for making reservations)

TRAVEL INFORMATION
- Prepare travel information sheet
  - Local transportation
  - Directions/maps

Method of payment for participants travel
- Self-pay participants
  AND/OR
- Sponsored event
- Coordinate participant air travel with designated travel agent

MEETING MATERIALS
- Create participant name tags
- Develop training/seminar/conference agenda
- Provide speaker(s) bio(s)
- Create final participant roster
  - Alphabetize by participant last name
  - Group by jurisdiction/state and alphabetize by participant last name
- Create participant tent cards, if needed
- Develop participant meeting evaluation form
- Assist with collecting meeting materials (printing, binders, packets, local restaurants/sites/activities, etc.)
DURING MEETING
- Conduct meeting registration
- Set up a resource room/display table
- Approve charges to Master Account on a daily basis
- Serve as primary hotel liaison/troubleshooter

POST-MEETING
- Collect participant evaluation forms
- Return shipment of meeting materials
- Review final meeting charges
- Update participant roster

BUDGET

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speakers’ expenses and fees</td>
<td>_______</td>
</tr>
<tr>
<td>Printing</td>
<td>_______</td>
</tr>
<tr>
<td>Supplies (notebooks, name tags, etc.)</td>
<td>_______</td>
</tr>
<tr>
<td>Staff hotel per diem</td>
<td>_______</td>
</tr>
<tr>
<td>Food/beverages</td>
<td>_______</td>
</tr>
<tr>
<td>Audio/visual equipment</td>
<td>_______</td>
</tr>
<tr>
<td>Travel (staff and participants)</td>
<td>_______</td>
</tr>
</tbody>
</table>

TOTAL                                              | _______|